

JM FINN

Investment | Wealth



JM Finn Portal Guide

User guide for your JM Finn online account

Welcome to the JM Finn client portal

An online portfolio valuation tool that meets the requirements of today's investor.

Living up to our goal of delivering a personal, relationship-driven service requires an online portfolio valuation tool that meets the requirements of today's investor.

Having been one of the pioneers in developing a proprietary online tool for our clients, we are in the fortunate position of being able to update according to our clients' needs. By not having an off-the-shelf solution we are able to keep the tool current and relevant.

Access our online valuation tool today.

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Register (accessing for the first time)

Using your preferred web browser, navigate to www.jmfinn.com and click on the login button on the top right of the screen. Enter your username and password and click the Login button.

You will be asked to input three specified digits of your PIN. This is the 6 digit PIN that was sent to your registered postal address with your username.

You will then be prompted to change your temporary password. This should be changed to something memorable to you that has between 8 and 15 characters with letters and numbers. No special characters are required. Please memorise this password – we recommend that you do not write it down.

Change password

For security reasons we require you to change your password. Please enter new password and confirm password below.

When changing your password, the new password must meet the following criteria:

- Minimum number of characters: 7
- Maximum number of characters: 15
- Contain at least one upper case character
- Contain at least one lower case character
- Contain at least one number

Please create a password

Please confirm your password

[Next](#)

You will then be prompted to change your temporary PIN. This should be changed to something memorable to you that is 6 numbers. Please memorise this password – we recommend that you do not write it down.

Change PIN

For security reasons we require you to change your PIN and securely retain this for your records. Your new PIN must meet the following criteria:

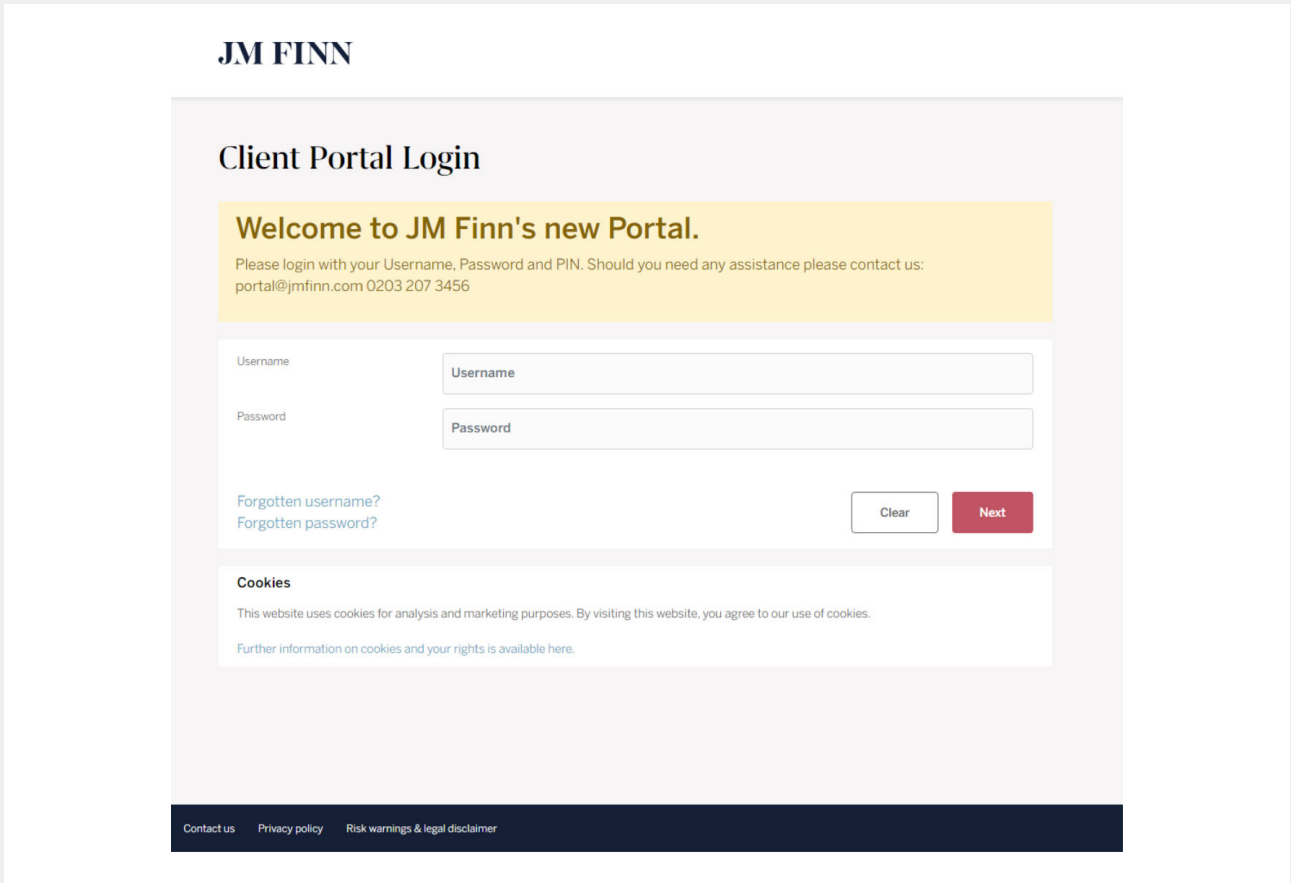
- Cannot use the same digit more than 2 times consecutively - e.g. 111222 or 123888
- Cannot consist entirely of sequential digits - e.g. 123456 or 876543

Confirm new PIN

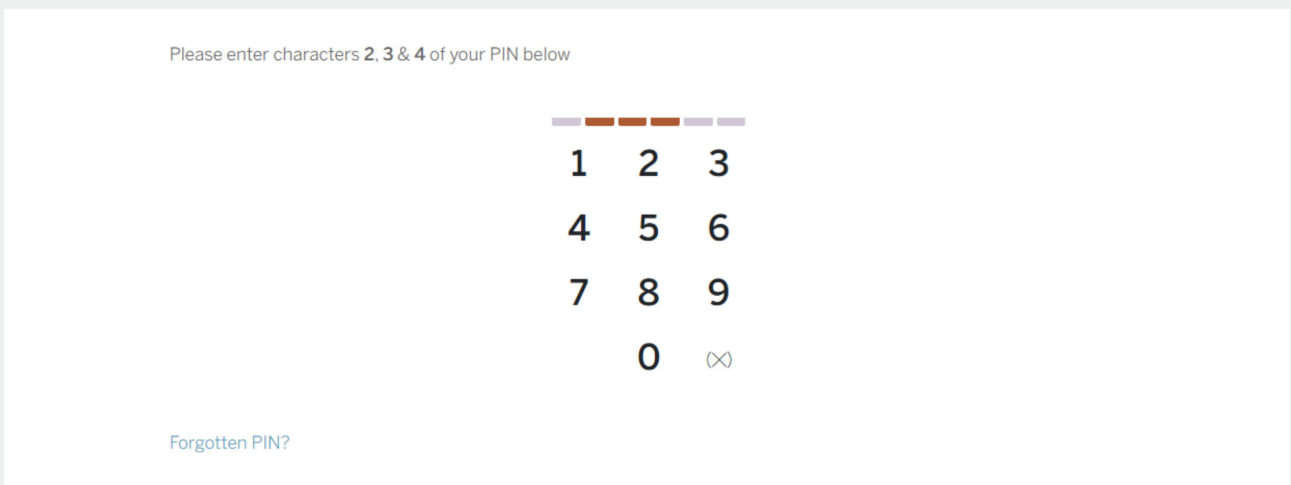
1	2	3
4	5	6
7	8	9
	0	∞

Login (accessing after you have already logged in once)

To login to the JM Finn Portal you will need your Username, Password and PIN. Should you require any assistance with this information, please do not hesitate to contact us.



You will be asked for three digits of your PIN, this will be different every time.



Dashboard

When logging in to the Portal the first page you will see is the Dashboard. Here you can see a summary of your portfolio totals, your top 10 holdings and links to your latest documents.

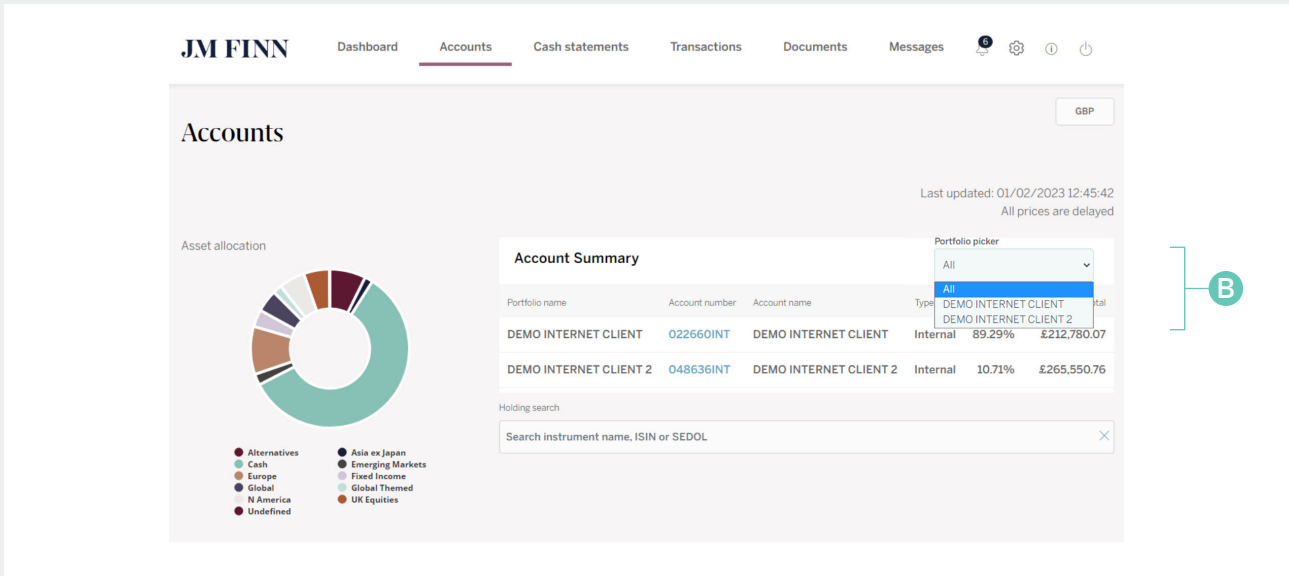
The screenshot displays the JM Finn Dashboard for a user named DEMO. The interface includes a navigation menu at the top with options like Dashboard, Accounts, Cash statements, Transactions, Documents, Messages, and a settings icon. The main content area is divided into several sections:

- Welcome DEMO:** Shows the last login time (29/11/2022 09:13:38) and the last update time (01/02/2023 12:45:42). It also includes an 'Export to PDF' button and a currency selector set to 'GBP'.
- Total Portfolio Value:** Displays a value of £478,530.85.
- Your cash:** Shows £0.00, with a deposit of £0.00 and a settlement of £0.00.
- Portfolios:** Lists two portfolios: 'DEMO INTERNET CLIENT - 022660' and 'DEMO INTERNET CLIENT 2 - 048636', each with a total value and a link to view accounts.
- Wealth breakdown:** Shows a total wealth of £212,780.07, which is 89.29% of the total portfolio value.
- Your asset allocation:** A donut chart showing the distribution of assets across various sectors. A callout 'A' points to this chart.
- Top holdings:** A table listing the top 10 holdings, including Cash, DWS DEUTSCHE GBL LQDITY SERIES PLC MANAGED STERLING RESERVED, INVESCO MANAGED INVESTMENT SERIES MONEY GBP ACC, LEGAL & GENERAL CASH TRUST CASH TRUST R ACC, NINETY ONE GLOBAL STRATEGY FUND MONEY A INC GBP, NINETY ONE GLOBAL STRATEGY FUND US DOLLAR MONEY A INC USD, Europe, NESTLE SA CHF0.10 (REGD), UK Equities, and MERCHANTS TRUST ORD GBPO.25.
- Your latest documents:** A list of recent documents, all labeled 'Custody' with 'New' status indicators.

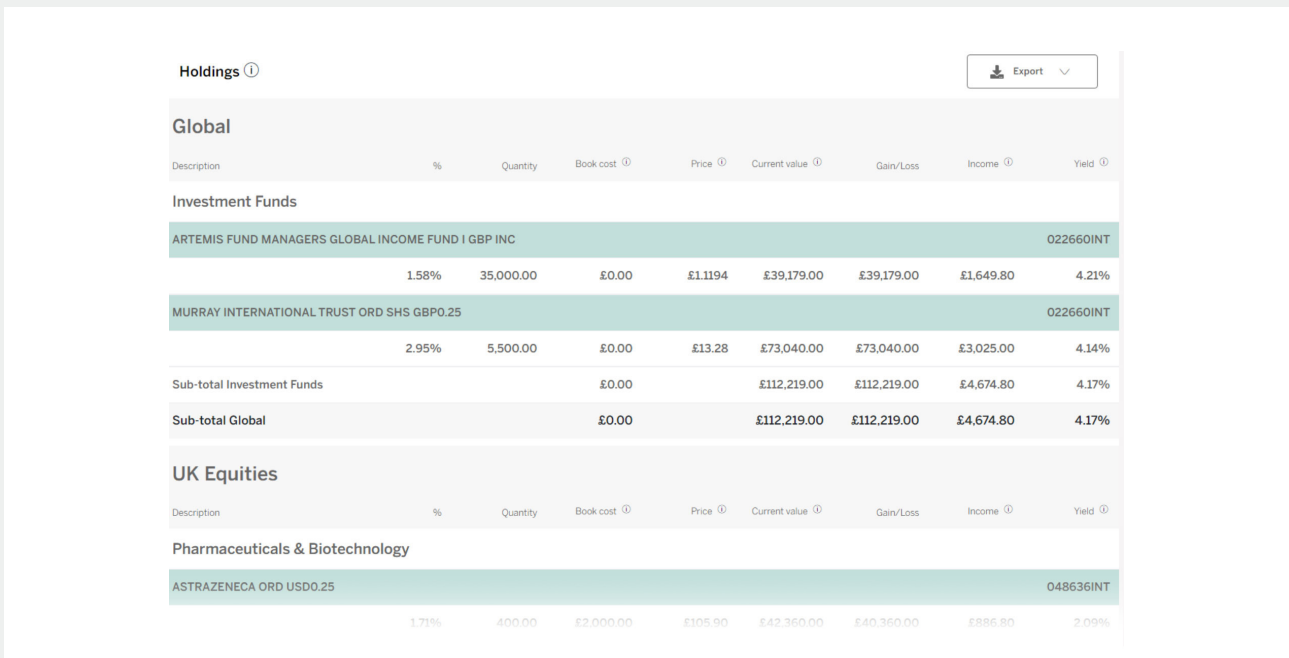
A The asset allocation wheel is interactive, allowing you to click on the different segments to view a breakdown of the asset types within that sector.

Accounts

Clicking on “Accounts” at the top of the page will take you through to your Account Summary.



The Accounts page gives a full overview of your portfolios and provides a list of all the Holdings in each portfolio.



B The portfolio picker allows you to drill down to view individual portfolios. This feature will adjust the entire page to show only assets and holdings of that particular portfolio.

Cash Statements

The cash statement allows you to view all cash statements dating back 2 years

Cash statements

Last updated: 01/02/2023 04:44:48
All prices are delayed

Filter by Date

One day | **Last month** | Last 6 months | Last 12 months | Year to date | Custom

Date from: Date to:

Actions

Currency: Account type: Account Picker:

Trade date	Settlement date [ⓘ]	Description	Currency	Debits [ⓘ]	Credits [ⓘ]	Balance
01 Feb 2023	01 Feb 2023	Closing Balance	GBP			£16,447.32
31 Jan 2023	31 Jan 2023	Interest paid on CR bal to 31/01/23 Income Account	GBP		£57.07	£16,447.32

- C** You can filter by the suggested periods or with a custom date. This data can be downloaded to a spreadsheet using the Export button.

Transactions

The Transaction view allows you to view all transactions dating back 2 years.

Transactions

Last updated: 01/02/2023 04:44:48
All prices are delayed

Filter by Date

One day | Last 3 months | **Last 6 months** | Last 12 months | Custom

Date from: Date to:

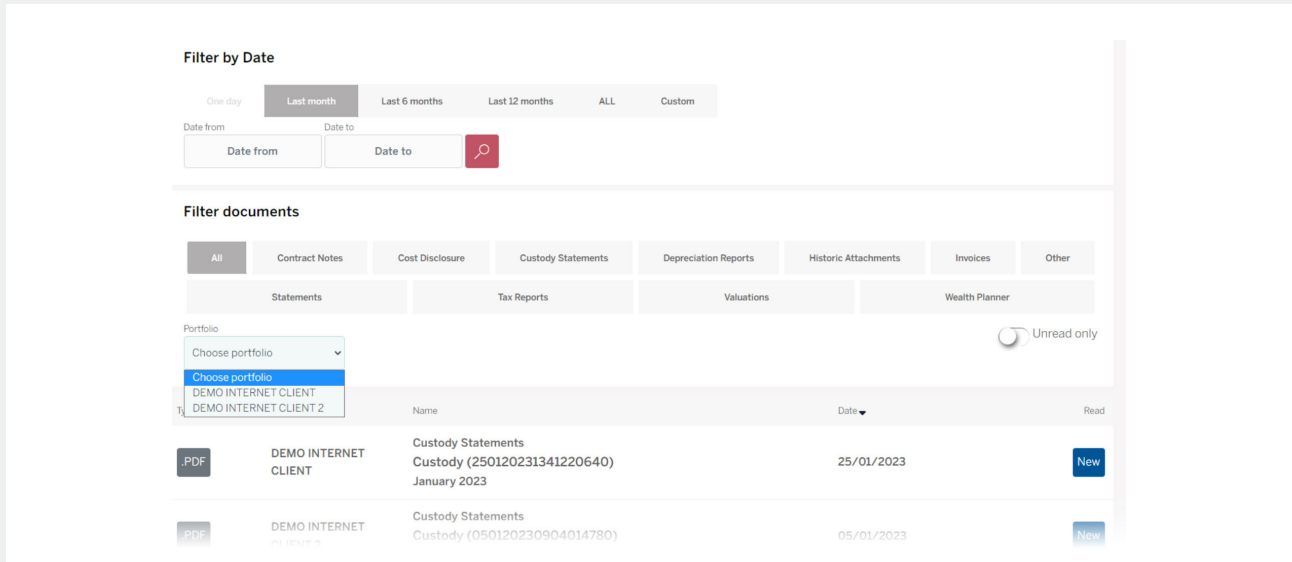
Actions

Date	Account Number	Type	Description	Currency code	Price	Proceeds/Costs
16 Aug 2022	087471GEN	Buy	SVS KENNOX STRATEGIC VALUE FUND A INC NAV	GBP	1.288	£11,934.00
15 Aug 2022	087471GEN	Sell	CG PORTFOLIO FUND PLC DOLLAR HEDGED GBP INC	GBP	101.71	£12,693.75

- D** You can filter by the suggested periods or with a custom date. This data can be downloaded to a spreadsheet using the Export button.

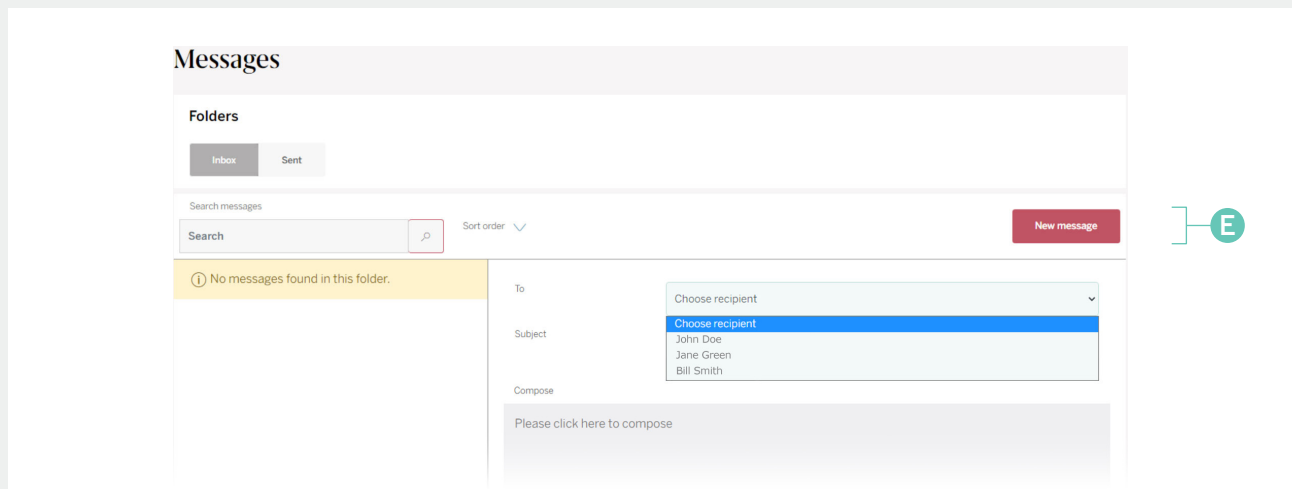
Documents

Documents are stored on the Portal for 3 years. You can filter them by date, document type, portfolio or by their read status. We advise clients to download the documents you wish to keep.



Secure Messages

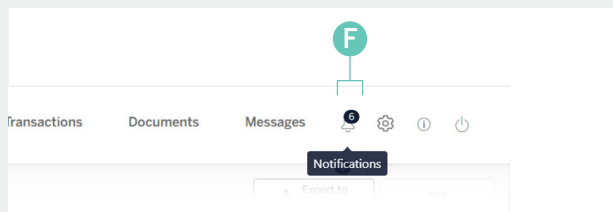
In the interest of reducing the chances of account documentation being intercepted, we have developed a secure messaging function for two-way messages between you and your investment managers. This eliminates the need to send documents as attachments by email, which is highly susceptible to hacking. You can also message our dedicated Helpdesk.



E After clicking “New Message” you will be able to select a recipient, enter a subject and type your message.

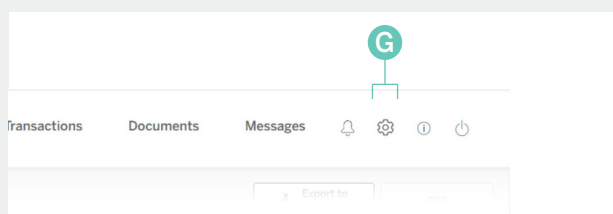
Personal Library Notifications

F At the top of each page there is the bell icon. These are your notifications advising how many new documents are waiting for you in the Personal Library.



Settings

G At the top of each page there is the Settings wheel. Clicking this will take you to the Settings page. Here you are able to reset your security questions, change your password, PIN and update other security settings under your Profile.



Reset security questions

In order to reset your security questions please click the below button. For security reasons once you have saved your security questions you won't be able to view them.

Reset security questions

Change password

When changing your password, the new password must meet the following criteria:

- Minimum number of characters: 7
- Maximum number of characters: 15
- Contain at least one upper case character
- Contain at least one lower case character
- Contain at least one number

Current password

Enter current password

Please create a password

Enter password

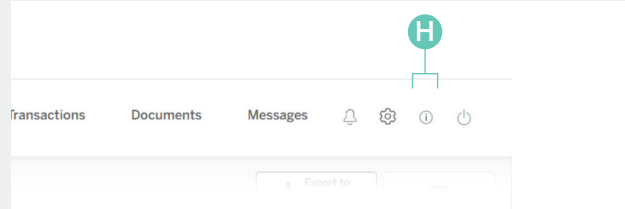
Please confirm your password

Enter password

Change password

Accessing more Information

H Clicking on the information icon will allow you to navigate to a new page. This page will contain our FAQs, JM Finn Bank Details and information on how to raise a Fraud Alert with us.



The FAQs will show a list of frequently asked questions relating to the Portal, such as if a mobile app is being used and details regarding security features.

The Bank Details will show JM Finn's Bank Details that can be used in order to transfer money to be used for your portfolios.

Fraud Alert allows you to raise a concern if you feel there is any security threat to your account. To do this, please complete the form which will alert our IT team. They will inform your Investment Manager who will follow up with you to discuss next steps such as locking the account or resetting your details.

Fraud Alert F.A.Q. & User Guide Bank Details

FRAUD ALERT

If you feel you have been the victim of a cyber-attack or your account has been hacked, JM Finn have the ability to automatically freeze your on-line access to the portal as a temporary measure.

If you wish your cash and dealing accounts at JM Finn to be restricted in any way, please contact your Investment Manager who can arrange this.

Full Name

JM Finn Username

Investment Manager

Fraud Description

I'm not a robot

SEND EMAIL

FAQs

Why has the Portal changed?

JM Finn continuously strive to deliver a secure environment to its clients, which includes the latest technology and structure. Our new Portal is part of this enhancement process.

Is there a Mobile App available?

Yes, the JM Finn Portal app can be downloaded from your device's app store. The app is reflective of the data on the website and is adaptive to the size of the device

Does the Portal support two-factor security?

Two factor security is available to the mobile app for those devices that support biometric identification via fingerprint or facial recognition.

Will my Username & Password change?

No – you will be able to login to the new Portal with the same Username, Password and PIN as you used on the old Portal.

What Internet Browser or Program is the Portal supported on?

The Portal will function on desk top PCs and Apple Macs using most web browsers, including Microsoft Edge, Google Chrome, Firefox and Safari. The Portal will not work on Internet Explorer due to outdated support by Microsoft, which we consider a risk to the security of your data.

JM Finn's Client Portal

Features

Available on your desktop computer, laptop or download our app by searching "JM Finn" on Google Play or the App Store

Arrange meetings with your Investment Manager directly from the portal

View, download and print all your account documentation for the last 3 years from your personal library

View the current value of your portfolio

Drill down to view the asset distribution across your portfolios

View a consolidated holdings report, by family group or by individual portfolio

Send and receive secure messages with your Investment Manager or representative

Two factor access details to help safeguard your privacy

Personal alerts when new documents are posted to your personal library

Access transaction statement and cash statement

Secure log-in from your smart phone or tablet (if available) via biometric identity check

View the portal via the app.

Available at:



Follow us on:



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